



2025 Personal Tax Questionnaire

for the income tax year starting 1 April 2024 to 31 March 2025

Please ensure you sign and return this questionnaire with all relevant information. Please mark the ENCLOSED box to confirm information is enclosed. If question is not applicable please mark the N/A box.

Note: Incomplete information will result in a delay in starting your accounts and may increase costs to you.

IN	arrie.		
A	RESIDENCY	ENCLOSE	N/A
1.	ARE YOU A NEW OR RETURNING NZ RESIDENT? Please provide us with your departure/arrival details from/to NZ	0	0
2.	HAVE YOU LEFT NZ PERMANENTLY OR FOR AN EXTENDED PERIOD? Please provide us with your departure details from NZ Have you completed any IRD Tax Residency Questionnaire? If so please provide copy PLEASE CONTACT US IMMEDIATELY IF YOU ARE PLANNING TO LEAVE NZ FOR AN EXTENDED PERIOD	0	0
3.	ARE YOU A SETTLOR/TRUSTEE/BENEFICIARY OF ANY OVERSEAS TRUSTS/ESTATES? Please provide details of the Trust/Estate	0	0
4.	HAVE YOU SOLD ANY PROPERTY (INCLUDING NON RENTAL) PURCHASED ON OR AFTER 29 MARCH 2018? Please provide details of property sales (Including sale and purchase agreements, settlement statements and valuation) \$	0	0
5.	HAVE YOU PURCHASED ANY PROPERTY (INCLUDING FAMILY HOME) ON OR AFTER 27 MARCH 2021? Please provide details of property purchases (Including sale and purchase agreements, settlement statements and valuation) \$	0	0
B	NEW ZEALAND INCOME	ENCLOSE	N/A
6.	EMPLOYMENT INCOME Income with PAYE/Withholding Tax deducted \$	0	0
	Redundancy payment received (Please attach letter from employer) \$	0	0
7.	INTEREST RECEIVED Please provide Resident Withholding Tax Certificate \$	0	0
8.	DIVIDENDS RECEIVED Please provide dividend statements (including power company dividend) \$	0	0
9.	PORTFOLIO INVESTMENT ENTITY (PIE) INCOME Please provide PIE statements	0	0
	\$		
10.	TRUST/ESTATE INCOME Please provide trust/estate name and details \$	0	0
11.	RENTAL INCOME Please complete separate Property Investment Questionnaire	0	0

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12. PARTNERSHIP/BUSINESS INCOME				
	Please complete separate Business Questionnaire	\circ	\bigcirc	
	\$			
13.	SHAREHOLDER SALARY/LTC LOSSES			
	Please advise name of companies & provide copy of financial statements	\bigcirc	\bigcirc	
	\$			
14	OTHER NZ INCOME			
14. (Please provide details			
	(E.g. share trading, Government stock, etc.)	\circ	\bigcirc	
	\$			
15.	ARE YOU ENTITLED TO PARTICIPATE IN ANY EMPLOYEE SHARE OPTIONS OR SIMILAR INCENTIVE SCHEMES?			
	Please provide details	\circ	\bigcirc	
	\$			
C	OVERSEAS INCOME	ENCLOSED	N/A	
16.	OVERSEAS SALARY/CONSULTANCY FEES	\bigcirc	\bigcirc	
	Please provide details	O	\cup	
	\$			
17	OVERSEAS RENTAL INCOME			
17.	Please complete separate Property Investment Questionnaire	\cup	\cup	
	\$			
18.	OVERSEAS INTEREST RECEIVED	\bigcirc	\bigcirc	
	Please provide interest certificates			
	\$			
19.	OVERSEAS DIVIDENDS RECEIVED			
	Please provide dividend statements	\circ	\bigcirc	
	\$			
00	OVERDE AS DENOION DAVIAGNES DESCRIVED	\bigcirc	\bigcirc	
20.	OVERSEAS PENSION PAYMENTS RECEIVED Please provide details of payments	O	\cup	
	Please provide details of payments			
01	OVERDE AG OLIA DEG (OLIDED ANNUATION (LIEF INQUIDANCE DOLICIES			
21.	OVERSEAS SHARES/SUPERANNUATION/LIFE INSURANCE POLICIES Please provide details including:	\circ	\circ	
	Cost of investments (including premiums and other contributions)			
	Purchase/contribution and sale/distribution details			
	Market values as at 01/04/2024 and 31/03/2025			
	Investment advisor reports and their contact details			
	\$			

D	EXPENSES	ENCLOSED	N/A
22.	INCOME PROTECTION AND DISABILITY POLICIES Please provide invoice/year end tax statement (Note "agreed value" polices are not deductible) \$	0	0
23.	MANAGEMENT FEES ON SHARE PORTFOLIO Please provide invoices	0	0
24.	INTEREST PAID IN RELATION TO INVESTMENTS Please provide interest summaries	0	0
	s ·		
A	TAY DEDATE FAMILY ASSISTANCE	ENCLOSED	N/A
25.	TAX REBATES/FAMILY ASSISTANCE CHARITABLE DONATIONS/PUBLIC SCHOOL FEES	ENCLOSED	N/A
	Please provide original receipts \$		O
26.	HOUSEKEEPER/CHILDCARE REBATE Please provide original receipts \$	0	0
27.	FAMILY ASSISTANCE Have you received any family assistance payments this year (This includes Working for Family Tax Credits and Independent Earner Credits)	⊙	N
E	OTHER INFORMATION	ENCLOSED	N/A
28.	STUDENT LOAN Please provide details of any voluntary payments \$	0	0
	Would you like overpayments refunded or applied to the loan?:		
G	HOW WOULD YOU LIKE YOUR TAX REFUNDS		
	Refund by cheque	0	
	Direct credit to nominated bank account as follows (Please include bank account holder name as well as numbers)	0	
	Transfer to offset other tax or future tax payable Transfer to other related party	\circ	
	Name & IRD number of other related entity	\cup	
	Offset against outstanding accounting fees	0	

H) HOW WOULD YOU LIKE TO SEND US YOUR DOCUMENTS					
via Xero Portal via Email Hard Copy		0			
HOW WOULD YOU LIKE TO RECEIVE YOUR COMP	PLETED DOCUMENTS				
Collect documents from PKF Withers Tsang office Collect documents and meet with accountant/partner to review to Courier to home/office address Post to home/office address Email and post copies to home/office address (Please note we are not responsible for any loss of documents sen (signature required) must be used if package is too large for stand	nt via courier or post and a courier	0000			
Name:	Signature:				
Email:	Phone:				
Postal Address:		Date:			

PLEASE REMEMBER TO COMPLETE THE TERMS OF ENGAGEMENT